QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q4 2023

INCLUDING Q1 - Q4 CUMULATIVE SUMMARY

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

QUIC QUARTERLY INTELLIGENCE COHORT

STUDENT STATISTICS REPORT Q4 2023

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THE QUARTERLY INTELLIGENCE COHORT

INTRODUCTION

Market intelligence is a critical driver of business success. At English UK, we are dedicated to supporting our members with advanced and timely information. Our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), offers unique features not found in the annual student statistics reports.

QUIC monitors the industry's changing landscape to provide a timely and extensive analysis of its source markets. As a result, the data provided offers the participating member centres a competitive advantage. Whilst executive summaries are made publicly available, the full reports are exclusive to these QUIC members, enabling them to benchmark their performance and monitor market trends.

The QUIC reports helped guide the member centres through some of the marketing challenges of the pandemic years. Now, they aim to identify key source markets to prioritise and invest in for future growth.

To ensure the highest accuracy, the data processing and subsequent analysis have been outsourced to BONARD, an independent market research firm and a member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence is always precise and reliable.

In Q4 2023, QUIC participants increased by five compared to Q4 2022, reaching 125 member centres. The current sample represents 38% of the overall English UK member base, one of the highest participation rates to date. This serves as a testament to the growing significance of QUIC.

To reflect the diverse nature of the sector and the association's membership, data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges from both private and state sectors.

Having gathered complete data sets from participating members in 2019 and 2022, we were able to include a historical comparative analysis and provide granular data on recovery levels.

The enhanced sectoral, regional, and provider-type breakdowns are exclusively shared with the QUIC cohort in the form of accompanying pivot tables. These user-friendly tools offer the participating members more granular intelligence and benchmarks tailored specifically to their organisation.

Note: Data is provided in student weeks, defined as one student taking 10 or more teacher-taught hours in one week. Those studying fewer hours are excluded from the calculations.

IN-DEPTH INSIGHTS INTO 100+ ELT SOURCE MARKETS SENDING INTERNATIONAL STUDENTS TO ENGLISH UK MEMBER CENTRES

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QUIC QUARTERLY INTELLIGENCE COHORT

GENERAL OVERVIEW

Q4 2023 AT A GLANCE

Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	25	24.8	32,141	29.2
South and South Eastern England	22	21.8	20,599	18.7
Northern England	21	20.8	27,057	24.6
South West England and the Channel Islands	15	14.9	14,084	12.8
Eastern England	10	9.9	10,417	9.5
Central England and Wales	5	5.0	2,926	2.7
Scotland and Northern Ireland	3	3.0	2,775	2.5
Total	**101**	**100.0**	**110,000**	**100.0**

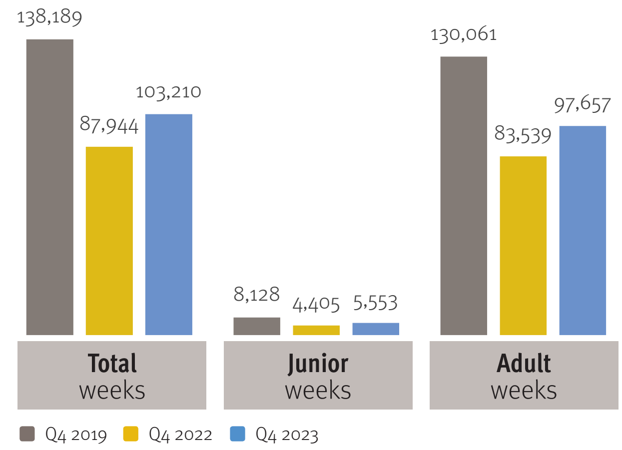
n=125 participating English UK members in Q4 2023
Note: The number of participating teaching centre locations in Q4 2023 is 101. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and may not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

The 125 English UK member centres subscribing to QUIC 2023 together represented 220 teaching centre locations in Q4 2023, of which 101 were operational (the same number as in Q4 2022). Cumulatively, they registered 110,000 student weeks.

Overall recovery of the sector slowed down, from 92% in Q1, 81% in Q2, 82% in Q3 to 75% in the last quarter of 2023. Specifically, adults recovered 75% of their 2019 student week volume while juniors recovered 68%.

Chart 1

Like-to-like comparison of student weeks by quarter



Based on a like-to-like comparison with Q4 2022, the highest year-on-year growth was seen in junior student weeks (+26%), which reached a total of 5,553 student weeks in Q4 2022. Adults also showed a positive year-on-year increase, with centres recording 103,210 student weeks in Q4 2023, up 17% on Q4 2022.

Table 2

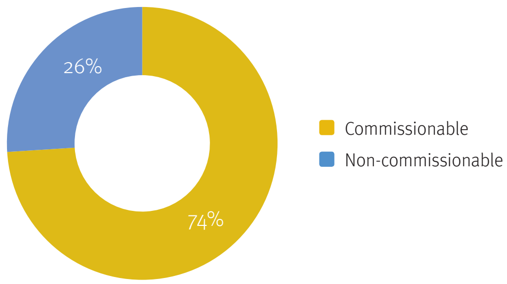
Year-on-year change in student weeks

	Total weeks	**Junior** weeks	**Adult** weeks
Q4 2019 vs Q4 2023	-25%	-32%	-25%
Q4 2022 vs Q4 2023	+17%	+26%	+17%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=112 member centres).
Note: Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2

Student weeks by booking source

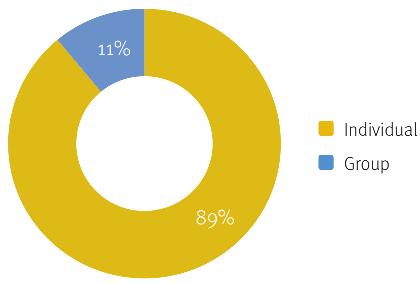


n=125 member centres participating in Q4 2023

The most prevalent booking source in Q4 2023 was commissionable student weeks. However, at 74%, the proportion of this source was the lowest of all the quarters (78% in Q1, 80% in Q2, and 79% in Q3), as was also the case in Q4 2019.

Chart 3

Student weeks by booking type



n=125 member centres participating in Q4 2023

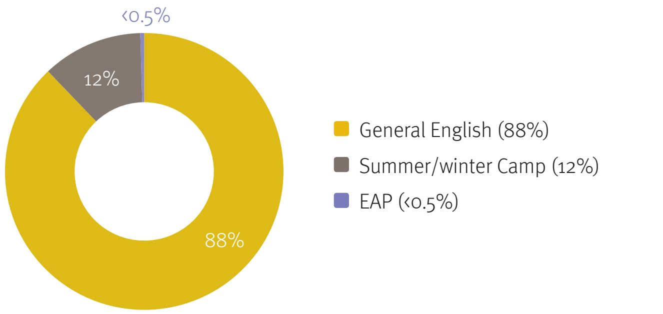
A like-to-like comparison reveals a growing trend toward individual bookings in the respective quarters of the successive years. Individual bookings grew from 86% in Q4 2019 to 87% in Q4 2022 and 89% in Q4 2023.

Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

GENERAL OVERVIEW

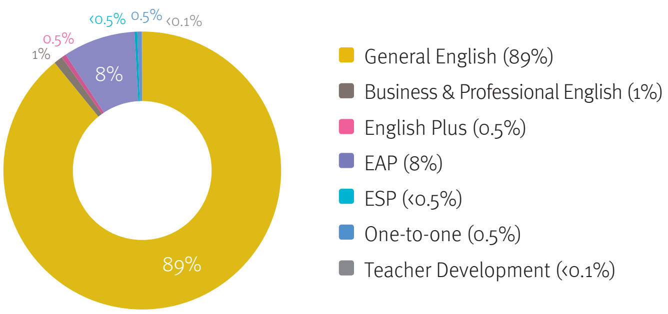
Q4 2023 AT A GLANCE

Chart 4
Student weeks by junior course types



n=125 member centres participating in Q4 2023

Chart 5
Student weeks by adult course types



n=125 member centres participating in Q4 2023

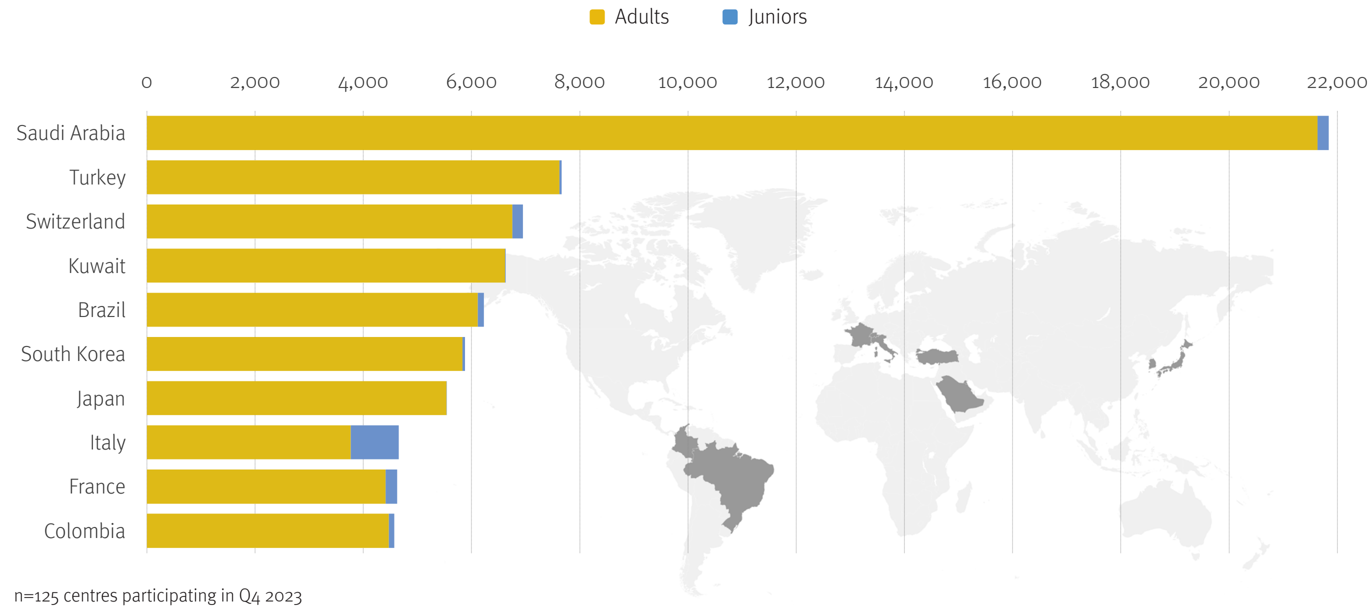
General English courses were predominant in both age categories, representing 88% of all junior and 89% of all adult student weeks.

A like-to-like comparison with Q4 2022 showed annual growth for both junior General English and Summer/Winter Camp student weeks (+28% and +13%, respectively on Q4 2022).

With the exception of One-to-one, all types of adult courses witnessed annual growth from Q4 2022 to Q4 2023.

Percentage-wise, English Plus registered the steepest growth at +28%. On the other hand, General English for adults recovered up to 81% of its 2019 volume.

Chart 6
Student weeks by age group and source country (top 10 markets)



n=125 centres participating in Q4 2023

In Q4 2023, the total student weeks from the top 10 source countries represented 68% of the overall figure.

Similarly to Q1 and Q2 2023, Saudi Arabia emerged as the top source country in Q4 2023, with 21,840 student weeks. In second place, Turkey trailed the leader by more than 14,000 student weeks (with 7,666 student weeks in total). Turkey also registered the highest absolute increase (+2,709 compared to Q4 2022).

Switzerland, in third position, performed similarly to Q4 2022 (+1%); however, Kuwait, in fourth place, recorded a growth of +1,966 student weeks (+46%). With a decrease of 6% in student weeks, Brazil descended from third place in Q4 2022 to fifth in Q4 2023.

Colombia also saw a positive development in Q4 2023, with the second-highest annual growth in absolute numbers, at +2,527 student weeks (+149%).

The top five leading junior source markets in Q4 2023 were Germany, Italy, Thailand, Spain, and Chile, representing 58% of the overall junior student weeks.

2023 SUMMARY

OVERVIEW

This section presents cumulative data for the full 2023 year. The figures relate to data from the 125 English UK member centres in QUIC that participated in all four quarters of 2023.

Table 3

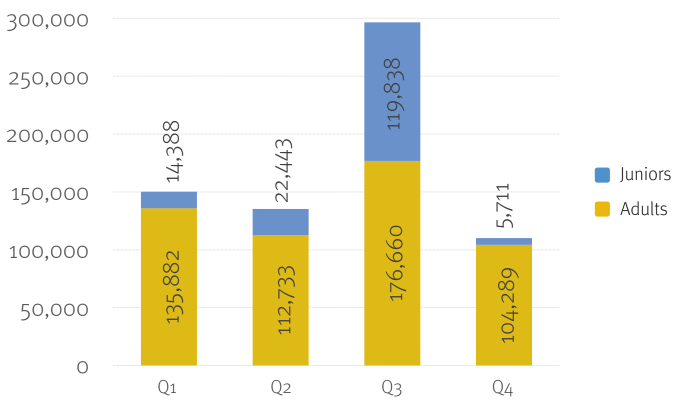
QUIC 2023 region summary

Region	Q1 No. of returns	Q1 Proportion of returns %	Q2 No. of returns	Q2 Proportion of returns %	Q3 No. of returns	Q3 Proportion of returns %	Q4 No. of returns	Q4 Proportion of returns %	2023 No. of returns	2023 Proportion of returns %
South and South Eastern England	24	22.2	38	27.3	62	30.2	25	24.8	149	26.8
London	27	25.0	36	25.9	48	23.4	25	24.8	136	24.5
Northern England	23	21.3	23	16.5	29	14.1	21	20.8	96	17.3
South West England and The Channel Islands	15	13.9	16	11.5	24	11.7	15	14.9	70	12.6
Eastern England	10	9.3	16	11.5	25	12.2	10	9.9	61	11.0
Central England and Wales	5	4.6	5	3.6	11	5.4	5	5.0	26	4.7
Scotland and Northern Ireland	4	3.7	5	3.6	6	2.9	3	3.0	18	3.2
Total	**108**	**100.0**	**139**	**100.0**	**205**	**100.0**	**104**	**100.0**	**556**	**100.0**

Note: The number of participating member centres in all quarters of 2023 was 125.
Note: The number of returns differs per quarter as this is submitted on a 'per teaching premise location' basis and so depends on when teaching centre locations are operational.
Note: Percentages may not add up to 100% due to rounding.

Chart 7

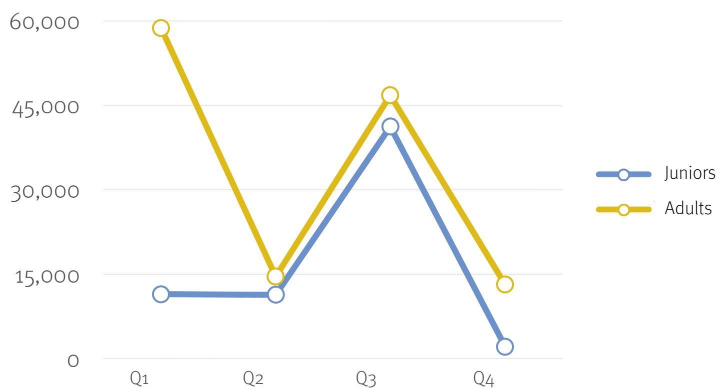
Student weeks by quarter and age group



Note: The figures in Chart 7 relate to data from centres reporting in all four quarters of 2023 (n=125 centres).

Chart 8

Absolute year-on-year change in student weeks (2022 vs 2023)



Note: The figures in Chart 8 relate to a like-to-like comparison, which is based on data from centres participating in both 2022 and 2023 (n=119 centres).

Chart 9
Student weeks by quarter and booking source

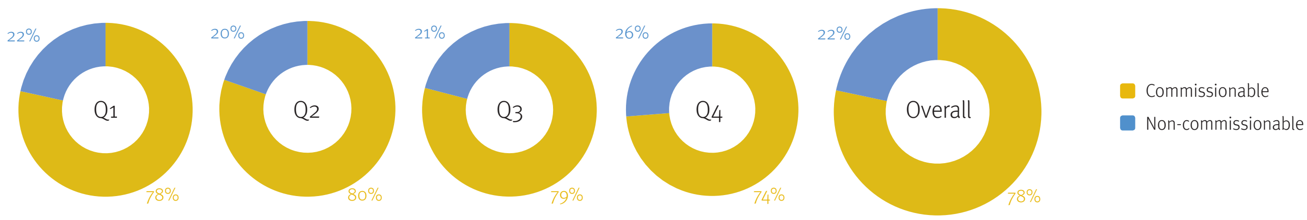


Chart 10
Student weeks by quarter and booking type

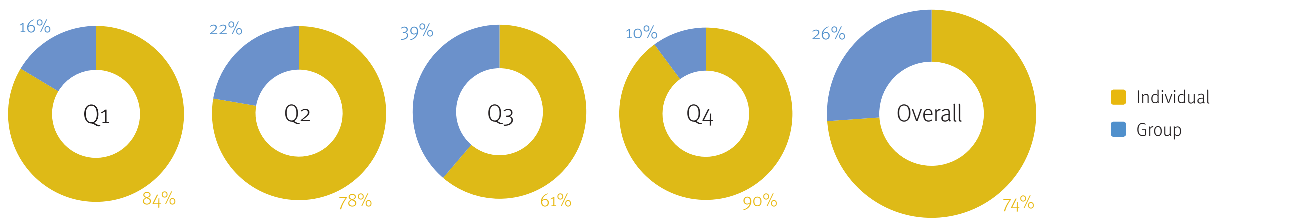


Chart 11
Student weeks by quarter and junior course types

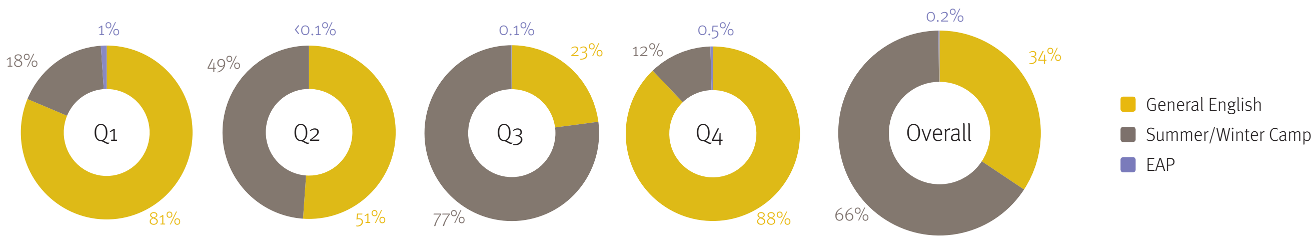
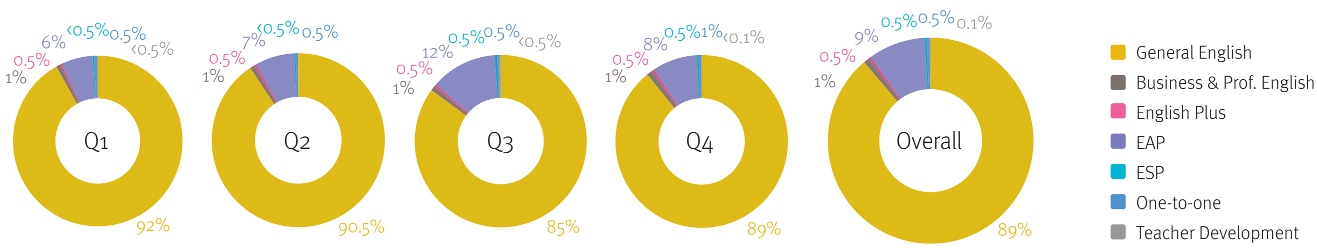


Chart 12
Student weeks by quarter and adult course types



Note: Percentages may not add up to 100% due to rounding.
Note: The figures in Charts 9, 10, 11 and 12 relate to data from centres reporting in all four quarters of 2023 (n=125 centres).

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